



Lakeline  
Wellness  
Center



# Root Cause Checklist Workbook

A patient handout for finding the missing pieces behind fatigue, brain fog, bloating, stress, hormone shifts, and stalled progress.

## Feeling stuck even though your labs are normal?

This workbook helps you organize your symptoms, lifestyle patterns, prior testing, and unanswered questions so your appointment can focus on the real drivers instead of only chasing symptoms.

Use it as a checklist. Bring it to your visit. Use it to build your Discovery Map.

Prepared for patients of Lakeline Wellness Center



## Start Here: Why This Checklist Exists

Normal labs can be useful, but normal does not always mean optimal.

Many patients have already had routine blood work and were told that everything looked normal. That is reassuring in one way: routine testing can help rule out major disease, organ failure, severe anemia, uncontrolled diabetes, and other important conditions. But it does not always explain why you still feel exhausted, foggy, bloated, inflamed, anxious, or unable to lose weight.

The goal of this workbook is to help you step back and look at your health as a connected system. Instead of asking only, "What symptom do I want to silence?" this checklist asks, "What pattern keeps showing up, and what root causes have not yet been investigated?"

### How to use this workbook

Check anything that applies. Do not try to be perfect. Circle or underline anything that feels especially important. Bring the completed workbook, a copy of recent labs, a medication/supplement list, and any previous diagnoses to your appointment.

## Before you begin

I understand this workbook is educational and does not replace medical diagnosis, emergency care, or individualized medical advice.

I will seek urgent medical care for chest pain, severe shortness of breath, one-sided weakness, fainting, severe allergic reaction, suicidal thoughts, uncontrolled bleeding, or rapidly worsening symptoms.

I understand that functional medicine testing and care plans should be selected based on history, exam findings, prior labs, medications, and clinical judgment.

I am willing to track symptoms honestly rather than guessing from memory.

Your top three health frustrations right now




## Quick Symptom Snapshot

Use this page to identify the areas that deserve deeper attention.

Check the symptoms that apply most weeks. Mark symptoms that are severe, worsening, or new with a star in the notes area.

- Fatigue that is not relieved by sleep or rest.
- Energy crash after meals or mid-afternoon crash.
- Brain fog, poor focus, word-finding trouble, or reduced mental clarity.
- Bloating, reflux, constipation, diarrhea, nausea, or unpredictable digestion.
- Joint pain, muscle aches, stiffness, headaches, or slow recovery.
- Sleep difficulty: trouble falling asleep, waking often, or waking unrefreshed.
- Mood changes: anxiety, irritability, low motivation, or feeling "wired and tired".
- Weight gain, weight-loss resistance, sugar cravings, or appetite swings.
- Cold intolerance, hair shedding, dry skin, low body temperature, or sluggishness.
- Hormone-related symptoms: low libido, cycle changes, hot flashes, PMS, erectile changes, or night sweats.
- Frequent infections, allergies, rashes, hives, sinus congestion, or histamine-type reactions.
- Chemical sensitivity, headaches from odors, poor alcohol tolerance, or feeling worse after exposures.

Date completed	
Main goal for the next 8-12 weeks	
One symptom I most want to understand	

### Pattern clue

The most important clue is often not one symptom. It is the pattern: when it started, what makes it worse, what improves it, and what other systems changed at the same time.



## Tier 1 - The Foundation

Sleep, hydration, movement, meals, and recovery determine how resilient the body is.

A high-performance health plan cannot rest on a crumbling foundation. Before chasing rare diagnoses, it helps to confirm whether the basic systems that regulate blood sugar, cortisol rhythm, lymphatic movement, hydration, and repair are being supported consistently.

### Sleep and circadian rhythm

Poor sleep can worsen insulin resistance, cravings, inflammation, pain sensitivity, thyroid conversion, immune resilience, and cognitive performance.

- I usually sleep less than 7 hours.
- I wake between 2-4 AM.
- I use screens late at night.
- I wake unrefreshed or need caffeine to function.

### Hydration and electrolytes

Hydration is not only water intake. Many patients need mineral balance, steady fluids, and attention to sweating, caffeine, alcohol, and medications.

- I rarely feel thirsty or I am thirsty all day.
- Urine is often dark or very frequent.
- I get headaches, cramps, lightheadedness, or palpitations.
- I drink mostly coffee, tea, soda, or alcohol.

### Movement and lymphatic flow

Movement helps glucose disposal, circulation, lymphatic drainage, bowel motility, mood, sleep pressure, and mitochondrial signaling.

- I sit for long blocks without walking breaks.
- Exercise wipes me out rather than energizing me.
- I do little resistance training.
- I feel puffy, swollen, or sluggish.

### Meal rhythm and protein

Meal timing and protein intake influence blood sugar stability, cravings, muscle maintenance, immune repair, neurotransmitters, and hormone resilience.

- I skip protein at breakfast.
- I snack frequently due to energy dips.
- I crave sugar, salt, or caffeine.
- I do not know my usual protein intake.

Foundation notes: what is realistic for the next 2 weeks?




## Tier 2 - The Red Flags

These symptoms are signals. The goal is to understand the driver, not only mute the alarm.

Fatigue, brain fog, bloating, pain, and poor recovery are often treated as separate problems. In functional care, they may point toward shared drivers such as blood sugar instability, mitochondrial strain, gut inflammation, immune activation, micronutrient depletion, toxin burden, poor sleep, or hormone imbalance.

Red Flag	What it can suggest
Fatigue	Not simply being busy or tired. Consider sleep quality, anemia patterns, thyroid signaling, blood sugar swings, mitochondrial fuel use, nutrient status, inflammation, infection burden, medication effects, and stress physiology.
Brain fog	May reflect sleep disruption, neuroinflammation, blood sugar variability, gut-brain signaling, histamine activation, toxin exposure, hormone changes, poor oxygenation, or nutrient deficits.
Bloating / GERD / bowel changes	Can be associated with low stomach acid, dysbiosis, food immune reactions, constipation, bile flow changes, pancreatic enzyme needs, stress signaling, or intestinal permeability.
Pain / inflammation	Can be driven by injury, autoimmune activity, poor recovery, oxidative stress, nutrient insufficiency, sleep disruption, food reactions, infection, or inflammatory lipid patterns.
Mood / stress reactivity	May involve cortisol rhythm, neurotransmitter balance, blood sugar swings, nutrient status, hormone shifts, sleep debt, inflammatory signaling, or unresolved life stressors.

### Red Flag tracking checklist

- My symptoms are worse after certain foods, alcohol, stress, travel, poor sleep, or environmental exposures.
- My symptoms fluctuate in a pattern that I can describe: time of day, cycle timing, meals, exercise, or stress load.
- I have had routine labs, but no clear explanation for why I still feel unwell.
- I have been told that symptoms are likely age, stress, or normal even though they affect daily function.

Red Flag notes: when symptoms started and what makes them better/worse



## Tier 3 - The Body Ecosystem: Gut and Stress

The gut, immune system, nervous system, and hormones constantly talk to one another.

Root-cause care looks at the body as an ecosystem. When one system is strained, other systems compensate. Over time, compensation can become symptoms.

### Gut and digestion

The gut is not only a digestive tube. It influences immune tolerance, inflammatory signaling, nutrient absorption, neurotransmitter precursors, detoxification, and metabolic health. Bloating or reflux may be the visible tip of a deeper pattern.

- Bloating within 30-90 minutes of meals.
- Constipation, diarrhea, alternating stools, urgency, or incomplete evacuation.
- Reflux, burping, nausea, bad breath, or feeling food sits heavy in the stomach.
- Known food reactions, multiple intolerances, hives, eczema, sinus congestion, or high allergy burden.
- History of antibiotics, stomach acid blockers, frequent NSAIDs, gallbladder removal, or food poisoning.
- Symptoms improve or worsen dramatically with specific diets but the benefit does not last.

### Stress physiology and HPA-axis patterns

Stress is not only emotional. The body also experiences stress from infections, blood sugar instability, poor sleep, pain, overtraining, under-eating, toxin burden, and inflammation. Cortisol rhythm can influence energy, sleep, cravings, immune response, and hormone balance.

- I wake tired but feel more alert late at night.
- I rely on caffeine, sugar, or adrenaline to push through the day.
- I feel worse after conflict, deadlines, travel, illness, or poor sleep.
- I have low resilience: small stressors feel like big stressors.
- I have low blood pressure, dizziness on standing, salt cravings, or shakiness between meals.
- I have ongoing pain, caregiving load, grief, trauma, shift work, or burnout history.

Gut and stress notes



### Tier 3 - The Body Ecosystem: Toxins, Hormones, and Immune Patterns

These areas often overlap with fatigue, brain fog, bloating, and weight resistance.

#### Toxic load and detoxification capacity

Toxic load does not mean that every symptom is caused by toxins. It means your total exposures and your ability to process them may be part of the picture. Relevant exposures can include mold/mycotoxins, heavy metals, solvents, pesticides, plastics, PFAS, occupational exposures, smoke, and some personal-care or cleaning products.

- Symptoms began or worsened after water damage, mold exposure, renovation, chemical exposure, wildfire smoke, or a job/environment change.
- I feel worse in certain buildings, rooms, or after strong smells.
- I have headaches, brain fog, fatigue, rashes, sinus symptoms, or mood changes after exposures.
- I sweat very little or feel worse with heat, sauna, or exercise.
- I have a history of high seafood intake, old dental amalgams, industrial work, shooting ranges, pesticides, or solvent exposure.

#### Hormones and immune signaling

Hormones are not isolated from the rest of the body. Thyroid signaling, insulin, cortisol, sex hormones, and immune activity influence one another. A hormone problem may be primary, or it may be downstream from inflammation, poor sleep, stress physiology, nutrient insufficiency, or metabolic dysfunction.

- Weight gain, weight-loss resistance, cold intolerance, hair shedding, dry skin, low mood, or constipation.
- Low libido, menstrual changes, PMS, hot flashes, night sweats, erectile changes, or fertility concerns.
- Past positive antibodies, autoimmune diagnosis, recurrent infections, allergies, hives, eczema, or unexplained inflammation.
- Blood sugar swings, fasting glucose high-normal, elevated insulin, cravings, belly weight gain, or post-meal sleepiness.
- Family history of thyroid disease, autoimmune disease, diabetes, cardiovascular disease, dementia, or early hormone decline.

Ecosystem notes: exposures, triggers, hormone/immune patterns



## Tier 4 - The Lakeline Discovery Map

Routine labs answer important questions. Functional testing asks different questions.

The Discovery Map is not about ordering every test. It is about choosing the right next questions. A basic screening may say, "No acute disease was found." A deeper functional evaluation may ask, "Why is this patient not functioning well, and which system is most likely driving the pattern?"

Area	What routine labs may miss	Discovery Map options to discuss
Nutrient status	Serum levels may not show whether nutrients are getting into cells or being used effectively.	Intracellular nutrient testing, vitamin D, B vitamins, magnesium/RBC magnesium, iron patterns, omega-3 index when appropriate.
Metabolic health	Fasting glucose can look acceptable while insulin resistance is already developing.	Fasting insulin, HOMA-IR, A1c context, triglyceride/HDL patterns, uric acid, waist measurement, post-meal response.
Cardiovascular risk	A routine lipid panel may miss particle burden, inflammation, oxidation, and inherited risk.	Advanced lipids, ApoB, Lp(a), oxidized LDL, hsCRP, MPO, homocysteine, fibrinogen when appropriate.
Gut and food reactions	Routine labs may not identify dysbiosis, intestinal inflammation, digestive insufficiency, or immune-mediated food patterns.	Comprehensive stool analysis, food immune testing when clinically relevant, calprotectin/lactoferrin, pancreatic elastase, bile patterns, SIBO assessment.
Mitochondria and metabolism	CMP/CBC may be normal while energy production, nutrient cofactors, or microbial metabolites are abnormal.	Organic acids testing, lactate/pyruvate context, CoQ10, carnitine, B-vitamin patterns, oxidative stress markers.
Toxins and oxidative stress	Routine labs may not assess mycotoxins, heavy metals, PFAS, VOCs, pesticides, or DNA/oxidative damage.	Total toxin testing, heavy metals, mycotoxin assessment, oxidative stress panels, 8-OHdG, glutathione-related markers.
Hormones and stress	Single hormone values may miss rhythm, metabolism, binding proteins, and downstream conversion.	Thyroid panel with antibodies when indicated, salivary/urinary cortisol rhythm, sex hormone metabolites, SHBG, DHEA-S.
Brain and nervous system	Routine screening may miss functional nervous system patterns linked to focus, sleep, mood, and stress resilience.	Neurotransmitter patterns, sleep assessment, HRV/neurophysiology tools, cognitive screening, inflammatory and metabolic context.

### Important

More testing is not automatically better. The best test is the one that can change the plan. Your history, exam, prior labs, goals, medications, budget, and timeline should guide the next step.



## Discovery Map Worksheet

Use this page to compare what has already been checked with what may still be missing.

Step 1: Write the most recent routine tests you have already completed. Include approximate dates if possible.

CBC / CMP	
Lipids / A1c / glucose	
Thyroid labs	
Hormone labs	
Inflammation markers	
Other tests	

## Step 2: Check deeper questions that may deserve discussion.

- Are my symptoms related to blood sugar or insulin patterns even if glucose is "normal"?
- Could nutrient insufficiency or poor cellular uptake be affecting energy, mood, hormones, or immune function?
- Could gut inflammation, dysbiosis, food immune reactions, or digestion issues be driving systemic symptoms?
- Could stress physiology or cortisol rhythm explain my energy pattern, sleep, cravings, or resilience?
- Could my toxin or mold exposure history be contributing to brain fog, fatigue, inflammation, or hormone disruption?
- Could oxidative stress or mitochondrial strain explain fatigue, poor recovery, or cognitive changes?
- Could autoimmune or immune activation be contributing to pain, inflammation, thyroid issues, rashes, or fatigue?
- Could hormone metabolism or thyroid conversion explain symptoms even if basic screening looked acceptable?

Questions I want to ask at my appointment



## Score and Prioritize Your Missing Pieces

This page helps turn symptoms into a focused appointment plan.

Rate each area from 0-3. A higher score means the area is affecting your life more often, more severely, or with less explanation. Do not worry about exact scoring; the purpose is to reveal patterns.

Area	0 None	1 Mild	2 Mod.	3 Major	Notes / examples
Sleep / circadian rhythm					Hours, wake-ups, snoring, screens, waking unrefreshed.
Hydration / electrolytes					Thirst, urination, cramps, headaches, dizziness, caffeine/alcohol.
Movement / recovery					Sedentary time, exercise intolerance, muscle loss, slow recovery.
Blood sugar / cravings					Energy crashes, sugar cravings, belly weight, post-meal sleepiness.
Gut / digestion					Bloating, reflux, stool changes, food reactions, prior antibiotics.
Brain / mood / focus					Brain fog, anxiety, irritability, low motivation, focus problems.
Hormones / thyroid					Libido, cycle/menopause symptoms, cold intolerance, hair/skin changes.
Immune / inflammation					Pain, rashes, allergies, autoimmunity, recurrent infections.
Toxins / exposures					Mold, chemicals, heavy metals, occupational/environmental exposure.
Mitochondria / oxidative stress					Fatigue, poor exercise tolerance, slow healing, poor recovery.

Highest score #1	
Highest score #2	
Highest score #3	
My first practical change this week	



## Before Your Appointment: Bring the Puzzle Pieces

The more organized your information is, the more productive your visit can be.

### Appointment preparation checklist

- Recent labs, imaging reports, specialty notes, and previous functional medicine tests if available.
- Medication list: prescriptions, over-the-counter medications, hormones, injections, and as-needed medications.
- Supplement list: brand, dose, how often you take it, and whether it helps or causes side effects.
- Diet pattern: a 3-day food log, known food reactions, diets tried, and what improved or worsened symptoms.
- Sleep pattern: bedtime, wake time, nighttime awakenings, snoring, sleep apnea history, sleep tracker data if available.
- Symptom timeline: when major symptoms began, major illnesses, infections, injuries, stressors, travel, exposures, or medication changes.
- Environmental history: water damage/mold, workplace exposures, pesticide/solvent exposure, heavy metals, smoke, hobbies, and household products.
- Goals: what you most want to change in the next 8-12 weeks and what a successful plan would look like.

### What is possible when the right driver is identified?

Patients sometimes feel stuck because the wrong map is being used. A standard workup may rule out major disease while still missing the functional pattern that explains poor performance. When the driver is identified - such as blood sugar instability, gut inflammation, toxin burden, hormone metabolism, stress physiology, nutrient depletion, or neurophysiologic imbalance - the care plan can become more specific and measurable. Individual results vary, but a better map usually leads to a better next step.

Final notes to bring with me



## Ready for a deeper dive?

If you completed this checklist and realized there are significant gaps in your current care plan, Lakeline Wellness Center can help you build a more complete Discovery Map.

### Finding the missing piece

You are not "stuck" because your body is broken. You may simply not have found the right lever to pull yet. A root-cause evaluation helps connect symptoms, history, standard labs, and functional testing into a plan that can be tracked over time.

**Book your consultation and start your Discovery Map today:**

<https://www.lakelinewellness.com/appointments-and-portals.html>

Bring this completed workbook, recent labs, medication/supplement list, and your top 3 goals to your appointment.

Educational handout only. This material is not intended to diagnose, treat, cure, or prevent disease. Clinical recommendations should be individualized by a qualified healthcare professional.